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# PURCHASING USER MANUAL

## UPDATING OR CHANGING A PURCHASE ORDER

### INTRODUCTION

If you have saved (but not approved or ordered) a purchase order, you can add or remove items, or make modifications such as adding or changing vendor, updating the price or description of items, etc. A purchase order that has been approved or ordered cannot be changed, but can be voided (if, for example, items that have not been received need to be added to a new PO).

### TO UPDATE OR CHANGE A PURCHASE ORDER

After you have saved a purchase order, you can open it to finish adding requisition items.

1. Click the **PO Status** tab.

Figure 1 - PO Status

The screenshot shows the 'PO Status' tab selected. It includes search filters for PO #, Req #, Status (set to 'All Purchase Orders'), Request Date Range, and Departments. A 'Find' button is present. Below the filters is a table of purchase orders:

PO #	Required by Vendor	Status
<a href="#">Edit</a>	BEST BUY STORES LP	In Purchasing
<a href="#">Edit</a>	LAND TITLE & ESCROW INC	In Purchasing
<a href="#">Select</a> 009LAND	04/28/2008 BEST BUY STORES LP	All Items received
<a href="#">Select</a> 009TV	WINCO FOODS	Some Items received
<a href="#">Order</a> 000001		Approved

2. Browse the list of purchase orders to find and select the one you need.
3. Click **Edit** or **Order**. (Typically the status of a saved purchase order is **In Purchasing**.)
4. The purchase order will open on the **PO** screen.
5. Uncheck the **View Selected Items** check box.

Figure 2 - View Selected Items

The screenshot shows the 'PO' tab selected. It displays details for Department RWD: Central Office, PO # 74100000, Tracking # 398, and Vendor # 541659329 (FARPOINT TECHNOLOGIES INC). The status is 'New Purchase Order'. A red circle highlights the 'View Selected Items' checkbox, which is currently checked. Below the details is a table of items:

Sel	Req #	Need By	Notes	Atch	Status	Item #	Description	Qty	U/M*	Price	SubTotal
<input checked="" type="checkbox"/>	Menu	9000000	09/30/2008			Assigned to PO 45666	Desk	1	Each	800.00	800.00

All available requisition items will be displayed.

Sel	Menu	Req #	Need By	Notes	Atch	Status	Item #	Description	Qty	U/M	Price	SubTotal
<input checked="" type="checkbox"/>		00600aaa	09/30/2008			Line Approval Complete	15233	Canon Finisher	1	Each	250.00	250.00
<input type="checkbox"/>	Menu	03030303	09/30/2008			Line Approval Complete	651651	phone system	1	Each	900.00	900.00
<input checked="" type="checkbox"/>	Menu	03030303	09/30/2008			Line Approval Complete	89-ikk	projection screen	1	Each	200.00	200.00
<input checked="" type="checkbox"/>	Menu	03030303	09/30/2008			Line Approval Complete	oppo234	projector	10	Each	600.00	6,000.00
<input checked="" type="checkbox"/>	Menu	9000000w	09/30/2008			Assigned to PO	45666	Desk	1	Each	800.00	800.00
<input checked="" type="checkbox"/>	Menu	9000000w	09/30/2008			Line Approval Complete	020303	chair	1	Each	600.00	600.00

You can make several changes to your purchase order (NOTE: You cannot change the fiscal coding. You would have to reject the line items using the **Menu**.):

- Check the **Sel** check box next to any line item you want to add to your purchase order.
  - Uncheck the **Sel** check box next to any line item you want to remove you're your purchase order.
  - Change the **Item #**, **Description**, **Qty**, **U.M.**, or **Price** on any selected item as needed.
  - Click the asterisk next to the **Vendor #** field to **Find** and **Select** a vendor you want to use
  - If needed, click **Menu** next to a line item to take separate actions on each line tem. You can also select this menu after you have saved the line items on a purchase order. See the [Purchase Order Line Item Menu](#) section below.
  - If necessary, you can change the quantity (**Qty**) and/or the unit of measure (**U.M.**) on a line item if, for example, an item is only available in a certain quantity.
  - Click **Save**. You can continue to make changes until you are satisfied that the purchase order is complete or you can save it to come back to later.
- After the purchase order is saved, do the following depending on your agency's process:
    - Click **Complete**. This button is displayed if you are a Purchaser but not a PO Approver and your agency requires that your purchase orders be approved. The designated purchase order approver must approve them.
    - Click **Approve**. This button is displayed if you are a Purchaser and a PO Approver and your agency requires that your purchase orders be approved.
    - Click **Ordered**. This button is displayed if your agency does not require purchase order approval.